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# 1 HEDIS MENU

The Health Plan Employer Data and Information Set (HEDIS) module provides the capability to accept a patient listing to be matched to existing registry records. This data is only a **sampling** of patients and will not be imported into the registry. Based on the sample, a vaccination **export** can be created for the matched patients and their vaccinations.

Additionally, a report can be run to view the patients where no match was found.

The menu options available from HEDIS are:

- Load Sample
- Export Results

Depending on your use of the HEDIS module, your access permissions may differ. There are permissions to create data profiles and to perform the assessment.

## LOAD SAMPLE

To load a sample, perform the following:

1. From the **HEDIS** menu, point and click on the **Load Sample** option. The "HEDIS Import" window appears.

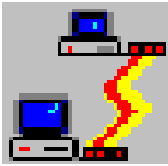


Figure 1-1: HEDIS Import

**HEDIS Import**

**Select Import Profile:** --select- ▾

**Select File:**

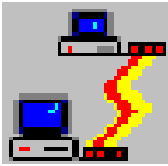
After you click on the 'Import' button, the file selected will be imported to the SIIS Webserver. This may take a few minutes depending on the size of the file. During this time, your browser may seem to be stuck waiting. However, it is just waiting until the file import has been completed. Do not click the browser 'Stop' button unless you wish to cancel the file import.

The following can be performed while on the "HEDIS Import" window:

- Define a New Data Profile
- Import an Existing Profile
- Define a New Data Profile
- Edit an Existing Data Profile
- Print a Data Profile Report
- View Import Logs (for errors)

**Note:** The maximum Import file size is 100 MB.

2. Determine the action you want to perform and continue to the respective section.



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## DEFINE A NEW DATA PROFILE / EDIT EXISTING PROFILE

This button is used when you want to create a new data profile or edit an existing profile.

A profile must exist before an Import can occur.

1. From the "HEDIS Import" window, click the **DEFINE DATA PROFILE** button. The "HEDIS Profile Creator – Add/Select Profile" window appears.

Figure 1-2: HEDIS Profile Creator – Add/Select Profile

HEDIS Profile Creator - Add/Select Profile	
Existing Profiles	Profile Name: --select--
New Profile	Profile Name:
<div>Cancel Continue Clear</div>	

2. If you are creating a new profile, type the name of the new profile in the **NEW PROFILE NAME** field and continue to the next step; otherwise if editing an existing profile, click the drop-down arrow in the **EXISTING PROFILES** field and select the profile you want to edit.
3. Click one of the available buttons:
  - **CANCEL** – to NOT save any selections or entries and return to the "HEDIS Import" window.
  - **CLEAR** – to erase the selections or entries and remain on the window to re-enter them.
  - **CONTINUE** – to access the next window to choose the file format selection. The "HEDIS Profile Creator – Select Format" window appears.

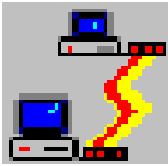


Figure 1-3: HEDIS Profile Creator – Select Format

HEDIS Profile Creator - Select Format

Sample Line:

Tab Delimited ☐

Delimited ☒ Delimiter:

Fixed Width ☐ Field Lengths(comma separated list):

Cancel Evaluate Sample Line Clear

4. Indicate the file type by clicking the radio button for **TAB DELIMITED**, **DELIMITED**, or **FIXED WIDTH**.
  - If choosing **DELIMITED**, indicate the symbol that will be used to separate the text in the **DELIMITER** field. For example, the pipe ( | ) symbol.
  - If choosing **FIXED WIDTH**, list each field's length and separate each field length with a comma. Do not put a comma after the last one.
5. Type an example of the data in the **SAMPLE LINE** field. For example, type a sample line of:

12345 | Sherri | Bull | 06031960 | F

The sample file should contain as much identifying information as possible to ensure the chances of finding a match; i.e., include family and/or address information such as Guardian First Name.

6. Click on one of the available buttons:
  - **CANCEL** – to NOT save any entries and return to the "HEDIS Profile Creator – Add/Select Profile" window.
  - **CLEAR** – to erase the data and re-enter new data.
  - **EVALUATE SAMPLE LINE** – to continue and access the "HEDIS Profile Creator –Assign Fields" window.

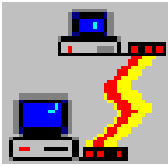


Figure 1-4: HEDIS Profile Creator – Assign Fields

HEDIS Profile Creator - Assign Fields		
Sample Field	Field Definition	Date Format
12345	-select-	-select-
Sherri	-select-	-select-
Bull	-select-	-select-
06031960	-select-	-select-
F	-select-	-select-

Cancel Submit Definitions Clear

Observe the three columns on the window: Sample Field, Field Definition, and Date Format. The Date Format column is only used to define formats of all dates.

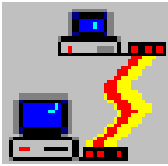
7. View the **SAMPLE FIELD** column and click each drop-down arrow in the **FIELD DEFINITION** column to select each field's definition.
  - If any dates are listed, select the format of the field by clicking on the drop-down arrow in the **DATE FORMAT**.
  - Your window should resemble the one shown below.

Figure 1-5: HEDIS Profile Creator – Assign Fields Example

HEDIS Profile Creator - Assign Fields		
Sample Field	Field Definition	Date Format
12345	Medical Record Number	-select-
Sherri	Patient First Name	-select-
Bull	Patient Last Name	-select-
06031960	Patient DOB	MMDDYYYY
F	Patient Gender Code	-select-

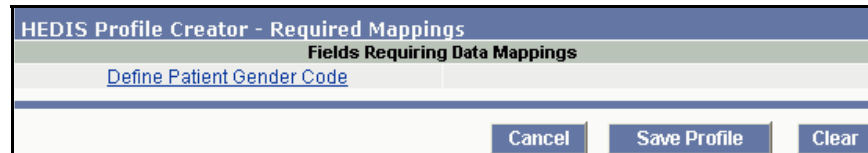
Cancel Submit Definitions Clear

8. Click one of the available buttons:
  - **CANCEL** – to return to the "HEDIS Import" window.
  - **CLEAR** – to erase and remain on the window to re-enter new field/date definitions.



- **SUBMIT DEFINITIONS** – to save the profile and exit to either the initial "HEDIS Import" window (indicating the profile was saved successfully) or the "HEDIS Profile Creator – Required Mappings" window.

You are finished creating a profile when you see the "HEDIS Import" window. If you see the "HEDIS Profile Creator – Required Mappings" window, continue to the next section.

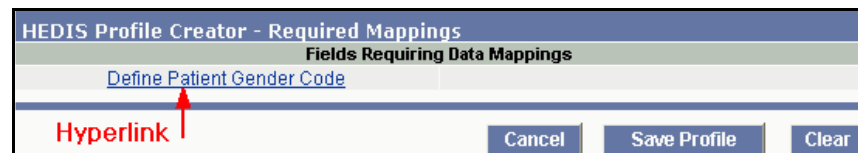


## REQUIRED MAPPINGS

When fields listed in the **FIELD DEFINITION** area require mapping, they will be listed in the "HEDIS Profile Creator – Required Mappings" window.

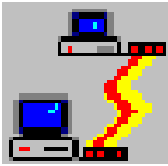
The term "mapping" means the translation of the import file codes to the codes used in the registry.

Figure 1-6: HEDIS Profile Creator Fields Requiring Data Mappings



Examples of when you will need to "map" the fields are: Patient Gender Code, Patient Ethnicity Code, Vaccine Code, Manufacturer Code, County Code, etc.

1. To continue with the profile, continue to the next step; otherwise, click on one of the available buttons (versus the hyperlink):
  - **CANCEL** – to return to the "HEDIS Import" window.



- **CLEAR** – remains on the window.
  - **SAVE PROFILE** – saves the profile and returns to the "HEDIS Import" window.
2. From the "HEDIS Profile Creator – Required Mappings" window, click the hyperlink. The "HEDIS Profile Creator – Define Field Code" window appears.

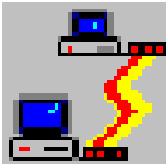
Figure 1-7: HEDIS Profile Creator – Define Patient Gender Code

HEDIS Profile Creator - Define Patient Gender Code	
Code	Description
<input type="text"/>	MALE
<input type="text"/>	FEMALE
<input type="text"/>	UNKNOWN
<input type="text"/>	OTHER

3. In the **CODE** column, type the code to coincide with the **DESCRIPTION** column. These are the codes within the import file. For example the codes could be M for Male, F for Female, U for Unknown, O for Other.
4. Click on one of the available buttons:
  - **CLEAR** – to erase entries and remain on the window to re-enter them.
  - **SUBMIT DATA MAPPINGS** – to save entries and return to the "HEDIS Profile Creator – Required Mappings" window.
5. Click one of the available buttons:
  - **CANCEL** – to not save and return to the "HEDIS " window.
  - **CLEAR** – to erase selections and remain on the window.
  - **SAVE PROFILE** – to save the profile. The "HEDIS Import" window appears (at the top of the window) with a message "Profile saved successfully."

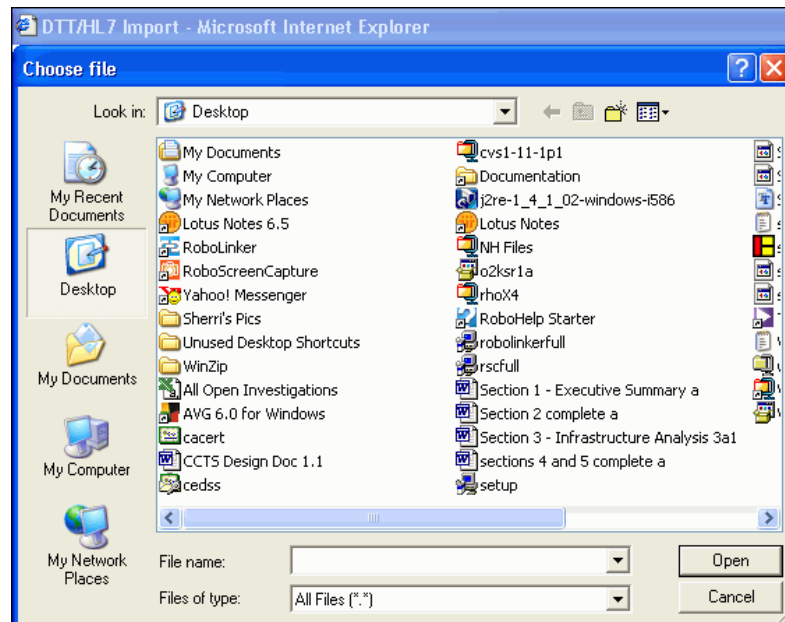
## IMPORT AN EXISTING PROFILE

This option assumes a data profile has already been defined and you are ready to upload the file to the State.



1. From the "HEDIS Import" window, click the drop-down arrow in the **SELECT IMPORT PROFILE** field and select the file.
2. In the **SELECT FILE** field, click the **BROWSE** button and select the file to import. The "Choose File" window appears.

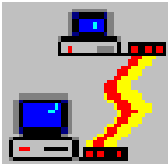
Figure 1-8: Choose Import File Dialog Box



3. Point and double-click the file name to select it or click the **OPEN** button. The "Import" window reappears with the "chosen" file name.
4. Point and click on one of the available buttons:
  - **IMPORT** button to send the file to be processed by the State Registry staff. The status bar at the bottom of the window will appear as it is being processed, and then a message appears at the top of the "HEDIS Import" window stating, "The file (actual filename) was imported successfully."

This may take some time to process depending on the size of the file. The browser may time out when processing lengthy imports. Periodically, check the "Import Log" to ensure the import processed properly.





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- **CLEAR** button to clear the fields in order to re-enter the criteria.

## PRINT DATA PROFILE REPORT

This option will print an existing data profile report.

1. From the "HEDIS Import" window, click the drop-down arrow in the **SELECT IMPORT PROFILE** field to select a data profile to print.
2. Click the **PRINT DATA PROFILE REPORT** button to display the report (shown below) in a new browser window providing the option to print the report to the local printer. If you don't want to print the report, close the browser window to return to the "HEDIS Import" window.

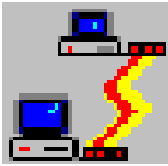


Figure 1-9: Data Profile Report

**Hedis Sample**  
**IRMS:** 1000  
**Creation Date:** 03/31/2004 10:38:02  
**Last Updated:** 03/31/2004 10:38:02

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**Format:** Delimited  
**Delimiter:** |  
**Field order and mappings:**

- Medical Record Number
- Patient First Name
- Patient Middle Name
- Patient Last Name
- Patient DOB
  - Date Format: MM/DD/YYYY
- Patient Mailing Address1
- Patient Address City
- Patient Address State Code
- Patient Address Zip Code

## VIEW IMPORT LOGS (FOR ERRORS)

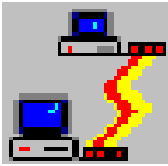
This option is used to view previously submitted imports and to see what the errors are so they can be corrected and then be imported again.

1. From the "HEDIS Import" window, click the **VIEW IMPORT LOGS** button. The "HEDIS Import Logs" window appears.

Figure 1-10: HEDIS Import Logs

HEDIS Import Logs				
View Errors	Profile Name	Date	Total Records	Errors
-->	HEDIS SAMPLE	2004-03-31 11:05	202	0
				Cancel

2. Perform one of the following bulleted items:
  - Click the **CANCEL** button– to not view the errors and return to the "HEDIS Import" window.



- Locate the file whose errors you want to view by clicking on the **SELECT** button (under the "View Errors" column). The "HEDIS Import Errors" window appears.

If the total number of **errors** exceeds 100, you may want to import a smaller file by copying/pasting a subset of the larger "original" file and view its errors. When the number of errors is large, the browser can experience a "memory limitation" and you will not be able to view the errors.

**Figure 1-11: HEDIS Import Errors**

HEDIS Import Errors		
		Create Error Report
Line Number	Details	Errors
1	<a href="#">view details</a>	Patient Last Name is required for a Patient record. Patient Birth Date is required for a Patient record.
2	<a href="#">view details</a>	Patient Last Name is required for a Patient record. Patient Birth Date is required for a Patient record.
3	<a href="#">view details</a>	Patient Last Name is required for a Patient record.

The line number on which the error occurred is shown along with a "**View Details**" hyperlink and an error description.

3. Click an available button or hyperlink:
  - **CANCEL** to return to the "HEDIS Import Logs" list window.
  - **CREATE ERROR REPORT** – to display a report of all the errors in a new browser window providing the option to print the report (sample shown below).

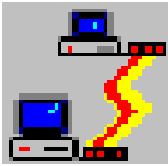


Figure 1-12: HEDIS Error Report

HEDIS Import Error Report			
Profile: SAMPLE THREE			
Import Date: 2004-03-31 11:23			
Total Records: 202			
Total Error Records: 202			
Medical Record Number	Patient First Name	Patient DOB	Errors
TEST1001	GEORGE		- Patient Last Name is required for a Patient record. - Patient Birth Date is required for a Patient record.
TEST1002	JANE		- Patient Last Name is required for a Patient record. - Patient Birth Date is required for a Patient record.
TEST1003	MARIA	ANN	- Patient Last Name is required for a Patient record.
TEST1004	JOAN	ANN	- Patient Last Name is required for a Patient record.

- **VIEW DETAILS** hyperlink to display the "DTT Import Error Detail" window (sample shown below).

Figure 1-13: HEDIS Import Error Detail – Line 1

HEDIS Import Error Detail - Line 1		
<b>Errors Found</b>		
<ul style="list-style-type: none"><li>• Patient Last Name is required for a Patient record.</li><li>• Patient Birth Date is required for a Patient record.</li></ul>		<a href="#">Back to Error List</a>
Field Definition	Date Format	Field Value
Medical Record Number		TEST1001
Patient First Name		GEORGE
Patient DOB		
		<a href="#">Back to Error List</a>

- a) Click the **BACK TO ERROR LIST** to return to the "HEDIS Import Errors List" window.

## EXPORT RESULTS

To export results, perform the following:

1. From the **HEDIS** menu, point and click on the **Export Results** option. The "Export Results" window appears.

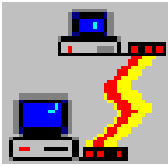
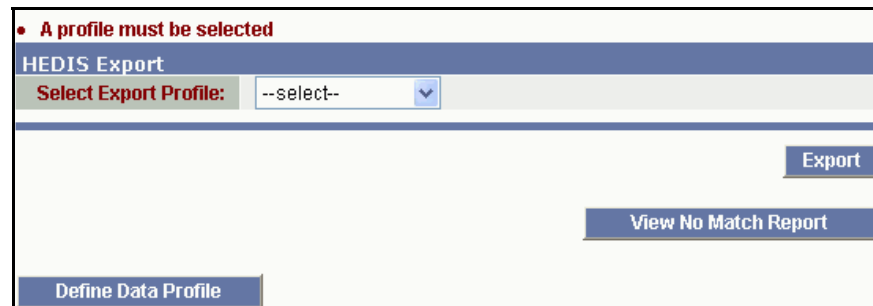
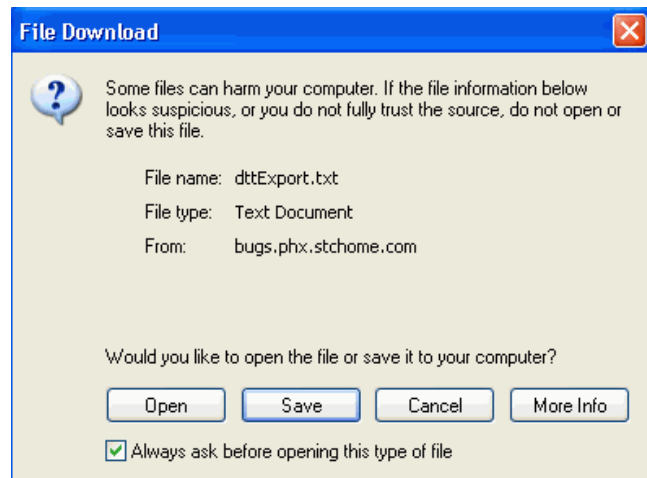


Figure 1-14: HEDIS Export



2. Point and click the drop-down arrow and select the **EXPORT PROFILE**.
3. Click on one of the available buttons:
  - **EXPORT** – to begin the download process. A "File Download" dialog box appears.

Figure 1-15: Export – File Download Dialog Box



- a) Click the **SAVE** button to save the file to your local drive. The "Save As" dialog box appears.

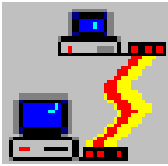
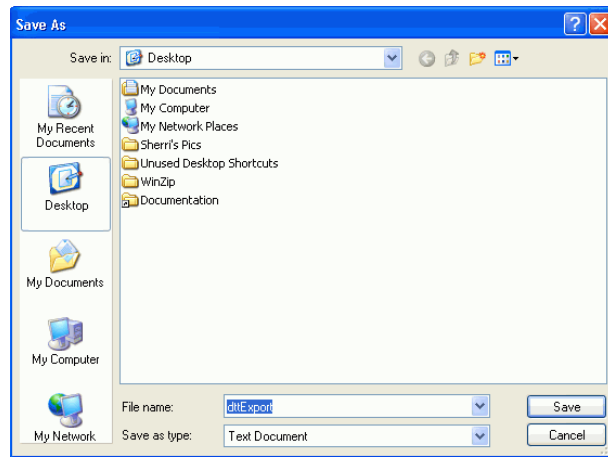


Figure 1-16: Export – File Save As Dialog Box



- b) Choose the location to save the file and click the **SAVE** button.
- **VIEW NO MATCH REPORT** – to display a report of patients that weren't matched.

Figure 1-17: Export – View No Match Report

<b>Report Date:</b> March 30, 2004				
<b>HEDIS Sample Patients with No Match</b>				
<b>Medical Record Number</b>	<b>First Name</b>	<b>Middle Name</b>	<b>Last Name</b>	<b>Birth Date</b>
				<a href="#">Back</a>

- a) While displaying the report, you may print the report using the browser's print button or click the **BACK** button to return to the "HEDIS Export" window.
- **DEFINE DATA PROFILE** – to define a new data profile or edit an existing one. Refer to the subsection titled, "Define a new Data Profile / Edit Existing Profile" for instructions.